Los Angeles County Community and Senior Services / SAMS Project

Software Help Sheet 28:

Termination and Deactivation of Consumers

Author:	Jaime Morales
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Background

Providers requested clarification as to when to deactivate a consumer and when to terminate the care enrollment and related components.

Ending Services or Consumers

This help sheet is prepared in four parts.

      Part I   – Deactivating a Consumer on the SAMS Assessment
      Part II – Terminating a Care Enrollment
      Part III – Inactivating a Provider, Fund Identifier and Care Recipient/Caregiver
      Part IV – Inactivating a Consumer

Part I must be completed for every consumer that is being deactivated. Parts II and III are to be completed only when both of the following requirements are met: 1) more than one active provider is present and 2) at least one provider will remain active. It is **imperative** that providers end only components directly related to their own service(s). Part IV is to be completed only when either one provider exists, or all existing providers have been made inactive.

If a consumer is receiving services from more than one provider and the consumer's status is changed to inactive, other providers are prevented from delivering ongoing services. Providers also need to invoice the services prior to deactivating the consumer. **Therefore, these instructions must be carefully followed.**

Below is a sample Summary view of multiple active providers highlighted in red. If your consumer has two or more active providers such as this example, you would only complete Part I, II and III.

Part I – Deactivating a consumer on the SAMS Assessment

When either deactivating a consumer or terminating a care enrollment, every provider must update the SAMS assessment section titled Reasons for Deactivation.

1. While viewing a consumer's information on the Details or Summary screen, **Click** on the **Assessment** button located within the Content Menu options.
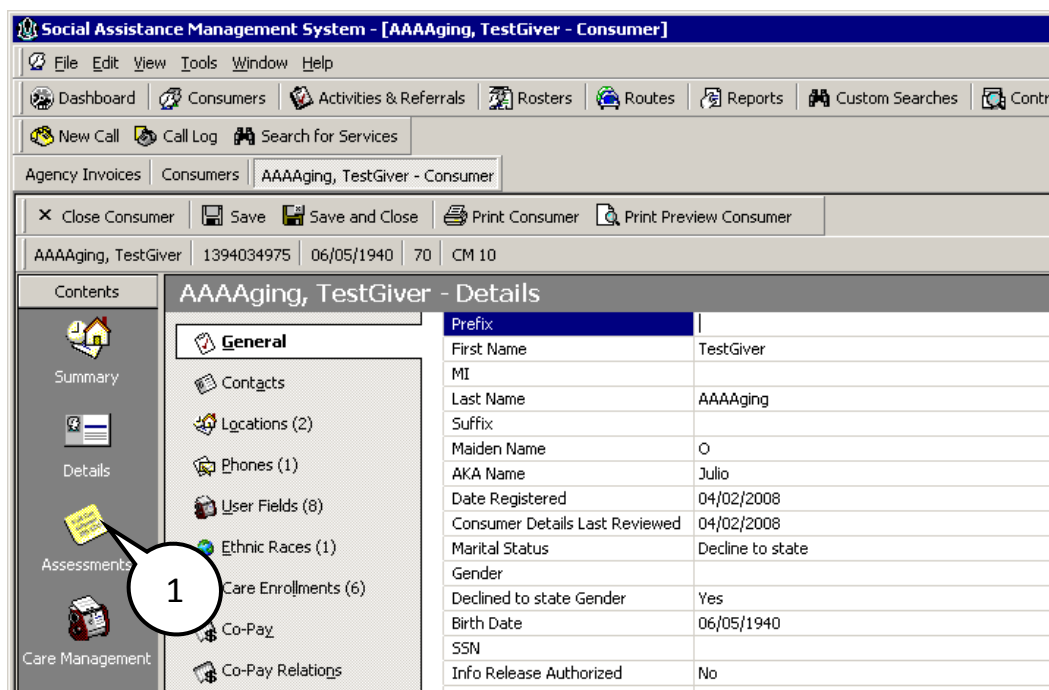
2. Once the Assessments screen is displayed, **double Click** on the appropriate **Assessment** to open it **(see note at end of page 3)**.
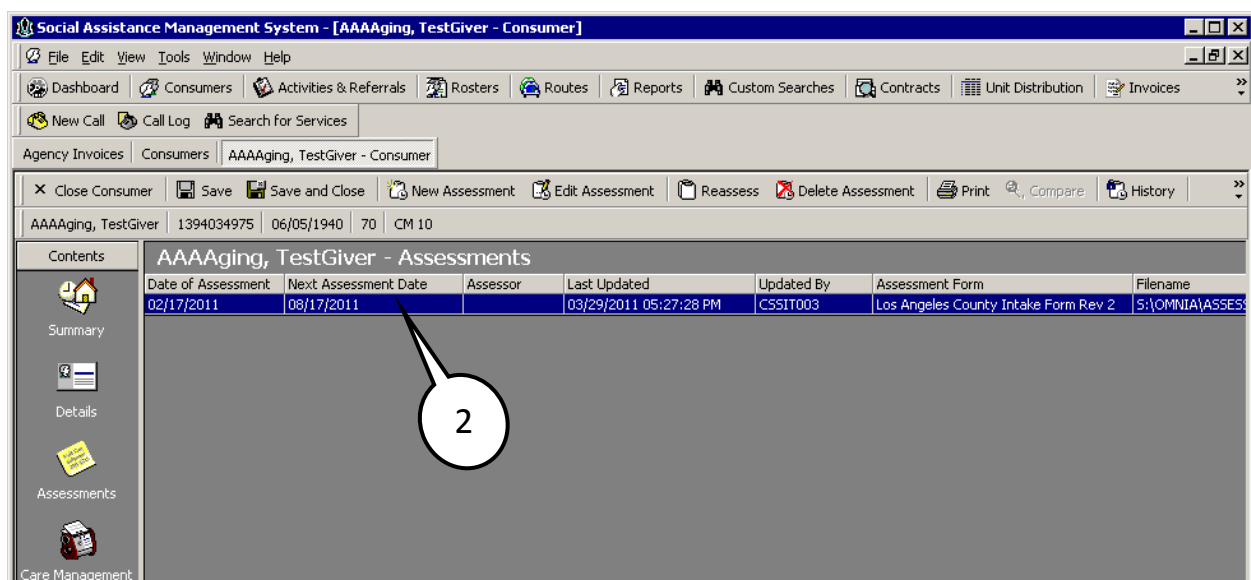
3. Once the Assesment is opened, **Click** on **Reason for Deactivation**.

4. **Change** the **Yes** answer to **No**, as Deactivation is now applicable.

5. **Select** the most appropriate **Reason** for **Termination** from the options list.

6. If in step 5, **Other Reason** is selected, **type** an appropriate **reason** for termination.

7. Once completed, **Click** on **Save and Close**.

*Note – If the current Assessment does not contain a Deactivation section, then a reassessment must be processed for the sole purpose of being able to complete the Deactivation section. If an Assessment has never been completed, then one must be started for the sole purpose of being able to complete the Deactivation section.

Part II – Terminating a Care Enrollment

Terminating a Care Enrollment is to be done only when one or more providers will remain active. It is **imperative** that providers Terminate only the Care Enrollment(s) directly related to their own service(s). **DO NOT TERMINATE CARE ENROLLMENT(S) FOR OTHER PROVIDERS.**

8.   From within the Detail section, **Click** on **Care Enrollment**

9.   Once the Care Enrollments are displayed, **select** the appropriate **Care Enrollment** to terminate.

10.   **Click** on **Edit Care Enrollment**.

11. When the Edit Care Enrollment window appears, **fill in** the **Termination Date** with the appropriate date.

12. In the **Status** field, **select Terminated**.

13. **Select** the most appropriate termination **Reason**.

14. In the **End Date** field, **enter** the **same date** as entered in the Termination Date field.

15. **Click** on the **OK** button.

Part III – Inactivating a Provider, Fund Identifier, Care Recipient and/or Caregiver

The process for deactivating a Provider, Fund Identifier, Care Recipient and/or Caregiver is the same. All sections require only the entering of an End Date. It is **imperative** that providers enter the End Date only on components directly related to their own service(s). **DO NOT ENTER END DATES FOR OTHER PROVIDERS.** The example provided demonstrates how to deactivate a Provider.

16.   From within the Detail section, **Click** on **Providers**

17.   Once the Providers are displayed, **select** the **appropriate Provider** to deactivate.

18.   **Click** on **Edit Provider**.
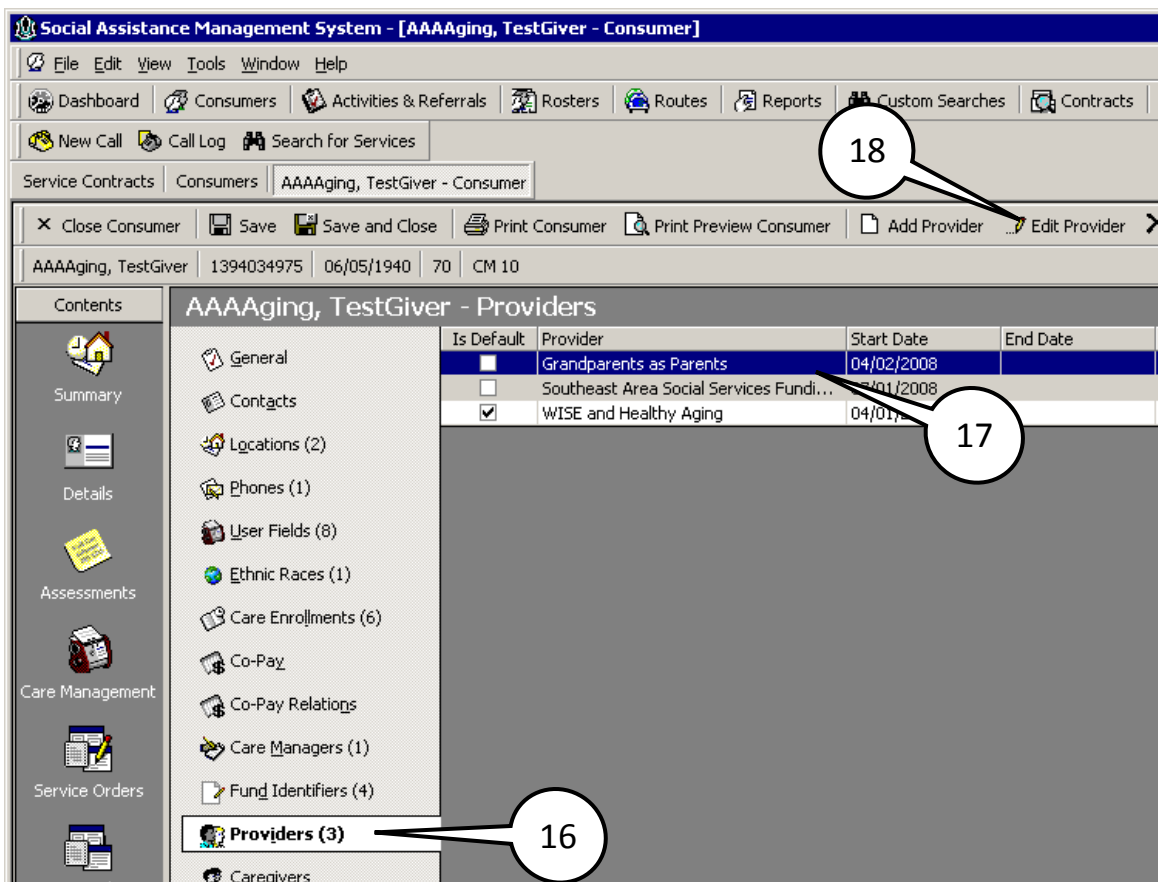
19. When the **Edit Consumer Provider** window appears, **fill in** the **End Date** with the appropriate date.

20. **Click** on the **OK** button

Part IV – Inactivating a Consumer

A consumer who has been deactivated can no longer receive services from any Los Angeles County provider(s).

21.   From within the **Detail** section, **Click** on **Plus sign [+]** located in front of the **Status** heading.

22. Once the section expands, **change** the **Active** field to **No**.

23. **Select** the most **appropriate option** for the **Reason** Field.

24. Under **Status Date**, **enter** the **date** the consumer was **deactivated**.

25. Now that you are done, **Click** on **Save and Close**.